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iPlanet Makes Its Play to Architect the Net Economy

Type: **Competitive Intelligence Report** Current Perspective: Positive/Neutral
 Analyst: J. Marino Vendor Importance: Moderate/High
 Report Date: December 12, 2000 Market Impact: Moderate

► Summary

Event Summary

December 11, 2000 - iPlanet unveils its next-generation commerce platform, which includes buying, selling, billing, market making, and trade facilitation software solutions, designed exclusively for the Internet to deliver continuous services with massive scale. The iPlanet Commerce Platform contains the company's Java-based business applications, including iPlanet BuyerXpert, iPlanet BillerXpert, iPlanet TrustBase Transaction Manager, iPlanet Market Maker, and iPlanet SellerXpert. The iPlanet BuyerXpert 4.0, BillerXpert B2B, and TrustBase Transaction Manager 2.2 products are available immediately.

Analytical Summary

- Current Perspective: Neutral to positive on iPlanet's launch of its B2B commerce (a.k.a. ISDP) platform, and new product upgrades, because the company provides vision and positioning for its core technologies and services, but is inconsistent in its delivery of commerce applications.
- Vendor Importance: Moderate to high on iPlanet, because the company takes a leadership role in positioning its product portfolio to address the larger e-commerce and communications issues of the Net economy, and establishes a framework to accelerate cross-sale opportunities of its extensive portfolio of commerce services and applications.
- Market Impact: Moderate on the Net markets infrastructure, buy-side applications, sell-side applications, and Internet billing segments, because the positioning relies on well-established services, applications, and technologies, and further development is necessary to deliver on the promise of re-architected platforms, speed to market, ease of use, and integration facility.

Target Markets

- ASPs
- Global 2000
- Systems Integrators
- B2B Communities
- Large Enterprises
- Web Portals

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► Perspective

Current Perspective : Positive/Neutral

We are taking a slightly positive stance on iPlanet's launch of its B2B Commerce Platform, because iPlanet has laid out the vision for its Internet Services Deployment Platform (ISDP), but is inconsistent in its delivery of commerce applications and services.

iPlanet's B2B Commerce Platform or ISDP leverages the company's portfolio of services, middleware, and integration technologies that sits on top of the OS and hardware base, and is the platform on which resides the commerce applications. The ISDP is comprised of User Management Services, Web, Application and Integration Services, Communications Services, and Portal Services that is the software environment that supports iPlanet's SellerXpert, BuyerXpert, Market Maker, BillerXpert, and TrustBase applications. Few competitors approach, in-house, the marshalling of such a full palette of technologies, services, and applications. iPlanet's commitment to Java component-based architecture and open standards ensure that the platform will remain apace industry developments, and is able to accommodate third-party solutions.

Conceptually, iPlanet positions the ISDP as a next-generation e-commerce and communications platform to enable organizations to define richer business processes in order to take advantage of the Net economy. Here, the challenge of translating business processes to open systems is to create new forms of values and new modes of, and models for competitive advantage. Operationally, the emphasis is on speed to market, ease of use, and integration of business processes afforded through a common platform infrastructure. iPlanet is positioned with its strong suite, and large installed base of middleware and services to engineer solutions integrating applications through the infrastructure platform. Practically, iPlanet can leverage one component or application to sell another, or make the case for the value proposition of, for example, using BillerXpert and Trustbase with Market Maker to architect an Internet business payments solution to extend transactional value throughout the supply-demand chain.

Competitors are likely to say that there is not much to iPlanet's ISDP announcement, and that it represents more of a marketing initiative or repackaging of available technologies and services. Furthermore, there is no common look and feel across all applications. BuyerXpert and Market Maker have not evolved to one platform with objects, BuyerXpert is not yet re-architected on top of Application Server, and SellerXpert is re-architected, but in the "early access" stage before release.

Ultimately, e-commerce solutions are designed to solve business problems, and in competitive sales situations iPlanet will need to compete on the strength of its services and applications. As mentioned above, the middleware technologies and services are strong, and iPlanet is able to leverage its large, installed base of Directory Server, Web Server, and Application Server. The BuyerXpert 4.0 upgrade is overdue, the sell-side application is more competitive in terms of core functionality, and iPlanet has strengthened its supporting catalog services through agreements with Requisite and Wiznet, although iPlanet still has no supplier network strategy (direct or indirect). With Market Maker in controlled release, iPlanet faces an uphill struggle in gaining market share against competitors that are more fleet afoot – especially with those rivals that have optimized the many collaborative processes and services across multiple domains, including procurement resources both for indirect and direct materials, and product development/planning processes through supply chain and logistics execution.

BillerXpert B2B Edition strengthens an already very strong IBPP application. BillerXpert 4.5 is re-architected on Application Server, and the B2B functionality is replete with hierarchical billing, workflow and permissioning, dispute resolution, and multi-currency and multi-language capabilities. iPlanet has leveraged its leadership role with the Identrus authentication initiative. iPlanet's TrustBase service is an important value-add to facilitate trade services within the digital marketplace environment. In coordination with Trustbase, iPlanet is able to position BillerXpert B2B as the focal point of an Internet business payments service which includes corporate payments, cash management, invoice presentment and dispute resolution, reconciliation, and credit and risk management services for e-procurement and e-marketplace settlement processes.

iPlanet's new release of SellerXpert is anticipated in the Q2 2001 timeframe. We caution the urgency with which iPlanet needs a timely sell-side application optimized for the B2B segment. We recommend to address important time to market issues that the iPlanet consider an acquisition where InterWorld would be a prime candidate on the basis of its very strong technology and core functionality and its well architected B2B vision.

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► Positives and Concerns

Competitive Positives

- iPlanet takes a leadership role in positioning its product portfolio to address the larger e-commerce and communications issues of the Net economy.
- iPlanet establishes a framework to accelerate cross-sale opportunities of its extensive portfolio of commerce services and applications.
- The iPlanet ISDP supports Java component-based architecture and open standards, which ensures that the platform will remain apace industry developments and accommodates third-party solutions.
- iPlanet upgrades its BillerXpert application for the important Internet business billing market, and positioned itself to target the market for Internet business payments that is foundational to building collaborative processes and extending transactional value throughout the supply-demand chain.
- iPlanet upgrades its BuyerXpert application to strengthen its competitive position in the buy-side applications segment with improved functionality and supporting catalog services through agreements with Requisite and Wiznet.

Competitive Concerns

- iPlanet's B2B Commerce or ISDP platform do not introduce any new developments beyond the three product upgrades, and represents the mapping of a vision that competitors will likely attack for lack of substance.
- The strength of iPlanet's ISDP platform is in its middleware applications and services, and the company has not articulated a strategy of how it will provision the services and establish the partnerships required to support the collaborative processes of B2B commerce.
- iPlanet is late to market in upgrading its BuyerXpert applications, and continues to risk loss of market share with the 2001 release dates of its SellerXpert upgrade and its Market Maker solution.
- iPlanet did not support the general ISDP launch with separate press releases or spec sheets detailing the three upgraded products undermining the effect of the event.

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► Recommended Actions

Recommended Vendor Actions

- iPlanet needs to develop a coordinated marketing and sales program because the ISDP vision will not sell itself, and individual sales representatives will be pressed to get command of the cross-sell opportunities afforded by the overall positioning strategy.
- With the vision in place, iPlanet needs to focus on the challenges required to implement B2B commerce, and provide a detailed map outlining the provisioning of services and establishment of partnerships that support the many collaborative processes across multiple domains, including procurement resources both for indirect and direct materials, and product development/planning processes through supply chain and logistics execution.
- iPlanet should leverage its BillerXpert B2B edition and its TrustBase service to take a leadership position among IBPP technology vendors in targeting Internet business payments to facilitate trade services within the digital marketplace environment.
- Speed to market is critical when competing in the Net markets space, and iPlanet should accelerate its Market Maker release, and the marshalling of services and alliances required to make it an effective solution.

- iPlanet should consider a major acquisition in the sell-side applications space to bolster its position and to address the time to market issues facing SellerXpert. In addition, an important consideration is the optimization of sell-side commerce specifically for B2B applications where a competitor such as InterWorld has highly regarded functionality and vision.

Recommended Competitor Actions

- On the surface, competitors do not need to address directly the iPlanet ISDP launch because, beyond the product upgrades, iPlanet relies on well-established services, applications, and technologies and does not introduce anything immediately threatening their competitive position.
- Competitors should be aware that iPlanet's ISDP is not an effort to enter into a functionality escalation technology arms race, but a deliberate strategy to build upon its product suite strengths in commerce middleware applications and services that could make iPlanet a more formidable rival in competitive sales situation for their applications.
- IBPP technology providers should be aware that iPlanet is strongly positioned to leverage its Internet billing and Trustbase services to provide Internet business payments, reconciliation, and trust services for e-procurement and e-marketplace settlement processes.
- Buy-side applications should recognize that BuyerXpert 4.0 makes iPlanet much more competitive in the e-procurement space, despite the company's underdeveloped supplier network strategy.

Recommended End User / Customer Actions

- Current customers of iPlanet's core infrastructure applications and services should be well aware of the opportunities provided for developing an integrated environment on which to base key applications sets.
- Prospective clients of iPlanet core infrastructure applications and services should be aware of iPlanet's commitment to provide a more tightly integrated platform supporting applications and infrastructure.
- Prospective Internet billing clients should consider iPlanet as a strong option when comparing solutions from Avolent, edocs, and Alysia.
- Prospective buy-side applications clients should consider iPlanet as a strong option when comparing solutions from Ariba, Clarus, Commerce One, and Oracle.

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